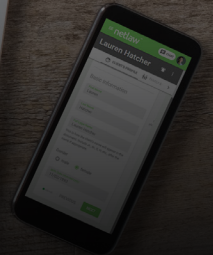




# The Hargrove Firm Counselor

News & Updates from Hargrove Firm & NetLaw



## TRUCENDENT™ + netlaw™

### Trucendent and NetLaw Announce Strategic Relationship

#### NetLaw Partners with Investnet's Trust Exchange

NetLaw recently announced a flagship partnership with Trucendent, Investnet's Trust Exchange. The partnership is estimated to generate referrals to Hargrove Firm beginning in the late third quarter of 2023. NetLaw will be integrated with MoneyGuide Pro, which will allow over 70,000 financial advisors to schedule with the firm on behalf of their clients instantly. For additional information on the partnership, please reference the detailed press release from June 7th below, and do not hesitate to contact the NetLaw team directly with specific questions.

## **Trucendent and NetLaw Announce Strategic Relationship to Deliver an Integrated Approach to Estate Planning via the Envestnet Financial Wellness Ecosystem to Financial Advisors**

Trucendent, a technology firm dedicated to improving estate planning for advisors and their clients, and NetLaw, a law tech company powering estate planning services from a national law firm, today announced a strategic relationship in support of the collaboration between financial advisors, clients, attorneys and corporate trust administrators to create and update clients' estate plans.

Anticipating the Great Wealth Transfer of an estimated \$84.4 trillion in the decades ahead, financial advisors are looking to assist their clients in estate planning now more than ever. However, there are several barriers to clients completing critical planning, including a reliance on law firms using traditional models. Now, Trucendent and NetLaw offer an online process that streamlines the steps from initiating the conversation with a client to setting a meeting with a lawyer to appointing a corporate fiduciary.

"We built NetLaw to make the estate planning process better for advisors and their clients," said Alex Hargrove, Chief Executive Officer of NetLaw. "Our relationship with Trucendent allows us to work together to address the needs of millions of Americans who need to secure their legacies with the guidance of their financial advisors and qualified legal counsel."

Sean Lawlor, Head of Solutions Distribution for Envestnet explained, "As part of Envestnet's suite of wealth solutions exchanges, Trucendent enables trust services, facilitating discussions about how to secure a family's financial future with the assistance of trusted fiduciaries. Trucendent and NetLaw are empowering advisors to deliver the Intelligent Financial Life™."

"Ensuring the smooth transition of wealth to the succeeding generation is a fundamental part of financial planning for financial advisory clients and their loved ones. We've heard from advisors that they want to assist their clients in estate planning using trust accounts tailored to each individual's financial strategy. We are pleased to continue to expand our capabilities through the Trucendent platform, by forming a strategic relationship with NetLaw to provide comprehensive estate planning support to financial services firms, their advisors, and their clients," conveyed Kara Mondoskin, Chief Operating Officer of Trucendent.

Advisors using the Trucendent platform will have the unique ability to offer their clients estate planning knowledge, access to specialized legal counsel, access to advisor-friendly corporate trustees, and a robust estate visualization experience. Financial services firms seeking more information should contact the Trucendent team to schedule a demo.

***Their Combined  
Technology  
and Processes  
Improve Estate  
Planning  
Experiences***

# Hargrove Firm Merges with Texas-Based Book Law Firm

## Lorne C. Book Leads New Office Beginning July 1



Hargrove Firm is pleased to announce the strategic expansion of its advanced estate, tax, and business planning legal services across the Dallas market with the addition of esteemed Texas tax and estate planning attorney Lorne C. Book of Book Law Firm. Both firms share a kindred vision of delivering innovative, first-class tax and estate planning services with a client-centric approach.

Arising from this shared vision, Hargrove Firm founding partner, attorney, and CPA, Jamie Hargrove and Lorne Book have agreed that Book Law Firm will merge with Hargrove Firm, effective July 1, 2023.

As the Hargrove Firm partner leading the new Dallas-based office, Lorne Book will provide sophisticated tax and estate planning services to clients as well as exit planning services for clients who are selling or on the cusp of selling their businesses. The opening of Hargrove Firm's Dallas-based office marks the firm's fifth physical office location at **4425 Plano Parkway, Unit 103, Carrollton, Texas 75010**, P: 214.305.6974, adding to the firm's offices in Pleasanton, California, Louisville and Lexington, Kentucky, and Cincinnati, Ohio; however, the firm also has additional offices and a team of 150+ of counsel attorneys located across the country.

# New Business Care Program Led by Ramsey Watson

## LLC Maintenance for Clients

Partner Ramsey Steele E. Watson leads Hargrove Firm's new Business Care program, the purpose of which is to represent clients in the annual maintenance of each business entity that they enroll. The Hargrove Firm Business Care team will ensure each client company maintains compliance with the appropriate state business authorities and remains in good standing. This includes filing any necessary annual reports with the applicable Secretary of State office(s), as well as preparing documentation associated with changes to foundational documents.

Program benefits you may mention to clients include:

- An annual review of the business entity with Hargrove Firm to discuss updates to business structure and applicable law changes
- Annual meeting minute preparation
- Filing of the annual report and facilitation of registered agent fee payments
- Filing of Statement of Change of Registered Agent/Office or Principal Office
- Invitation to participate in our Registered Agent Services

We want to ensure that Hargrove Firm of counsel attorneys have access to information regarding this new service. Whether you have LLCs that need annual maintenance, or you have clients that do, please feel free to get in touch directly with the Business Care team to learn more. The designated email address where the team can be reached is [businesscare@hargrovefirm.com](mailto:businesscare@hargrovefirm.com).

Of Counsel Attorney Resources

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